## **BREAKOUT SESSION #25**

FSA Partner Connect Preview

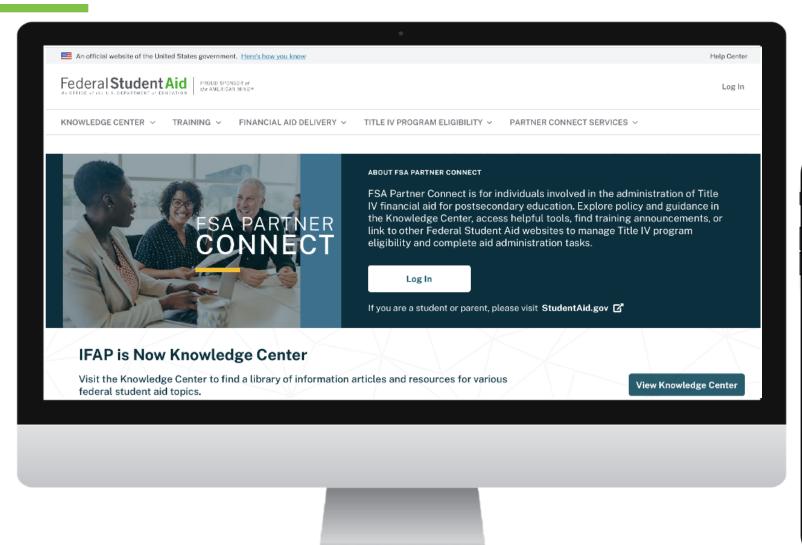
Shamarli Kollock, Kwaku Appiah and Eric Hardy
U.S. Department of Education

2020 Virtual FSA Training Conference for Financial Aid Professionals





## INTRODUCING FSA PARTNER CONNECT



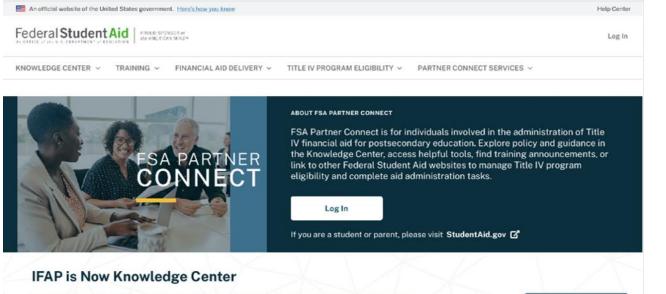


## NEW DIGITAL SITE FOR PARTNERS

Launching in March 2021 at fsapartners.ed.gov

## **FSA Partner Connect features:**

- A **new homepage** with links to FSA sites such as E-App, COD, and NSLDS, etc.
- A new Knowledge Center (previously IFAP) and a redesigned FSA Handbook
- Customized partner dashboards
- School profiles
- Student, parent, borrower accounts
- StudentAid.gov student view



Visit the Knowledge Center to find a library of information articles and resources for various federal student aid topics.

View Knowledge Center



Title IV regulations require schools to apply for approval to participate in federal student financial aid programs. Applications are submitted for various reasons including, but not limited to, initial certification, participation status changes, and general information updates.

Click to see more. Title IV Application

## **Quick Links**

COD Online

MSLDS

☑ e-App

FAA Access

**6** 65

**B** SAIG Portal

**FSA Twitter** 





10

Deadline for 2018-19 Underuse Penalty Waiver is 9/10/2018

10

Live Internet Webinar: Correctly Reported Gainful Employment...



Deadline for 2018-19 Underuse Penalty Waiver is 9/10/2018

10

Live Internet Webinar: Correctly Reported Gainful Employment...



Deadline for 2018-19 Underuse

## What's New

Dear Colleague Letter Posted on 02/11/2020 Webinar Recordings – New Accreditation...

Dear Colleague Letter Posted on 02/11/2020
Webinar Recordings – New Accreditation...

Dear Colleague Letter Posted on 02/11/2020
Webinar Recordings – New Accreditation...

Dear Colleague Letter Posted on 02/11/2020 Webinar Recordings - New Accreditation...

Dear Colleague Letter Posted on 02/11/2020

Federal Student Aid © @FAFSA - 4h

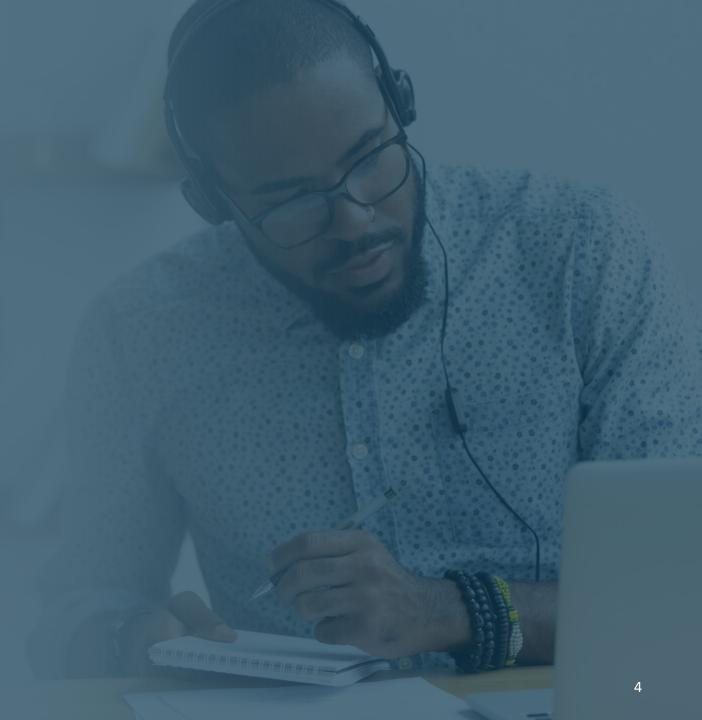
If you can affood it, confirms to make payments toward your student loans.
Here's wijn; bb.//2PAVICK

TAKE ADVANTAGE OF THE

O'S INTEREST RAIE PERIOD

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## NAVIGATING FSA PARTNER CONNECT



**Knowledge Center**, formerly IFAP, is featured prominently on the homepage for the public searching for Title IV guidance or policy

> Quick Links provides easy access to FSA's most frequently used sites by partners

**Header and Footer** for navigation and access to other FSA sites

An official website of the United States government. Here's how you know

Federal Student Aid | PROUD SPONSOR of



IV financial aid for postsecondary education, Explore policy and guidance in link to other Federal Student Aid websites to manage Title IV program eligibility and complete aid administration tasks

If you are a student or parent, please visit StudentAid.gov 2

## IFAP is Now Knowledge Center

Visit the Knowledge Center to find a library of information articles and resources for various federal student aid topics.



What's New

Dear Colleague Letter Posted on 02/11/2020

Dear Colleague Letter Posted on 02/11/202

Webinar Recordings - New Accreditation.

Webinar Recordings - New Accreditation.









**FSA Twitter** 



## KNOWLEDGE CENTER

Knowledge Center Home Knowledge Center FAC

FSA Training Conference

### FINANCIAL AID DELIVERY

Deadline for 2018-19 Underuse

Application & Verification Calculating Awards &

Reconciliation & Closeout

Title IV Participation Application Maintain Eligibility Audit Submission Cybersecurity School Closures

TITLE IV PROGRAM ELIGIBILITY

## STUDENT, PARENT.

Date Range Search Record ID Search

PARTNER PROFILE Partner Search

MORE INFO About This Site

> Data Center Help Center Feedback Cente Important Dates



## **Log In**, provides access to functionality requiring authentication



## IFAP is Now Knowledge Center

Visit the Knowledge Center to find a library of information articles and resources for various federal student aid topics.

iew Knowledge Cente

Title IV Information Title IV regulations require schools to apply for approval to participate in federal student financial aid programs. Applications are submitted for various reasons including, but not limited to, initial certification, participation status changes, and general information updates. Click to see more.

Title IV Application

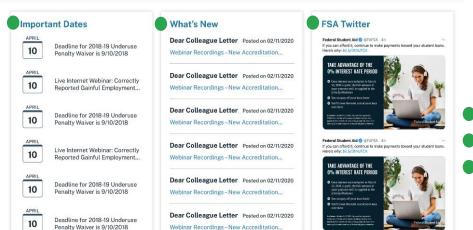


COD Online FAA Access









Important Dates, highlights upcoming relevant dates for partners What's New, highlights the most recent Dear Colleague Letters **FSA Twitter**, a consolidated list of Tweets from FSA's Twitter accounts - @fafsa, @FSACOO, and @FSAConf

**Help Center**, provides assistance, FAQs, and customer service

### KNOWLEDGE CENTER

Knowledge Center Home Knowledge Center FAQ

FSA Training Conference

### FINANCIAL AID DELIVERY Application & Verification Calculating Awards &

Origination & Disbursement

Campus-Based Processing

Return of Title IV Funds

Title IV Participation Application Maintain Eligibility Audit Submission Cybersecurity

## TITLE IV PROGRAM ELIGIBILITY

BORROWER ACCOUNTS

## STUDENT, PARENT Date Range Search Record ID Search

PARTNER PROFILE



MORE INFO





## PARTNER CONNECT - NAVIGATION LINKS

Easy access to 15+ existing FSA websites used by partners today

Knowledge Center	Training	Financial Aid Delivery	Title IV Program Eligibility	Partner Connect Services	
Knowledge Center Home ifap.ed.gov	Training Resources fsatraining.ed.gov	Application and Verification faaaccess.ed.gov	Title IV Participation Application eligcert.ed.gov	Student, Parent, Borrower Accounts	
FSA Handbook	FSA Training Conference fsaconferences.ed.gov	Calculating Awards & Packaging (EDESuite)	Maintain Eligibility (PEPS)	Partner Profile	
Knowledge Center FAQs	Financial Aid Toolkit financialaidtoolkit.ed.gov	<ul> <li>Origination &amp; Disbursement</li> <li>Campus-Based Processing</li> <li>Return of Title IV Funds</li> <li>cod.ed.gov</li> </ul>	Audit Submission ezaudit.ed.gov	The following FSA websites are also accessible from	
		National Student Loan Data System nsldsfap.ed.gov/fap	Appeals ecdrappeals.ed.gov	<ul> <li>Partner Connect</li> <li>SAIG Enrollment         fsawebenroll.ed.gov</li> <li>SAIG Mailbox         saigportal.ed.gov</li> <li>Experimental Sites         experimentalsites.ed.gov</li> </ul>	
		Reconciliation & Closeout www.g5.gov	Cybersecurity		
		Default Prevention and Management dmcseddebt.ed.gov	School Closures	Loan Servicing for Schools	

## **HELP CENTER**

- Contact Customer Support
- FSA Partner Connect FAQ
- FSA Customer Service Centers
- Helpful Links
- Access to FSA Systems
- Mailing Lists and Listservs

An official website of the United States government. Here's how you know Help Center

Federal Student Aid PROUD SPONSOR of the AMERICAN MIND

KNOWLEDGE CENTER V TRAINING V FINANCIAL AID DELIVERY V TITLE IV PROGRAM ELIGIBILITY V PARTNER CONNECT SERVICES V

Log In

## **Help Center**

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## **Contact Customer Support**

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## FSA Partner Connect FAQ (Frequently Asked Questions)



### **FSA Customer Service Centers**

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## Helpful Links

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## Access to FSA Systems

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## Mailing Lists & Listservs

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### KNOWLEDGE CENTER

Knowledge Center Home FSA Handbook

Knowledge Center FAQ

## TRAINING

Training Resources FSA Training Conference Financial Aid Toolkit

Application & Verification

Origination & Disbursement

### FINANCIAL AID DELIVERY

Calculating Awards &

Cybersecurity School Closures

Appeals

Reconciliation & Closeout Default Prevention &

### TITLE IV PROGRAM ELIGIBILITY

Title IV Participation Application Account Search Maintain Eligibility Date Range Search Audit Suhmission Record ID Search

### PARTNER PROFILE

STUDENT, PARENT,

BORROWER ACCOUNTS

Partner Search

### MORE INFO

About This Site Data Center Help Center

Feedback Cente Important Dates

8

## KNOWLEDGE CENTER

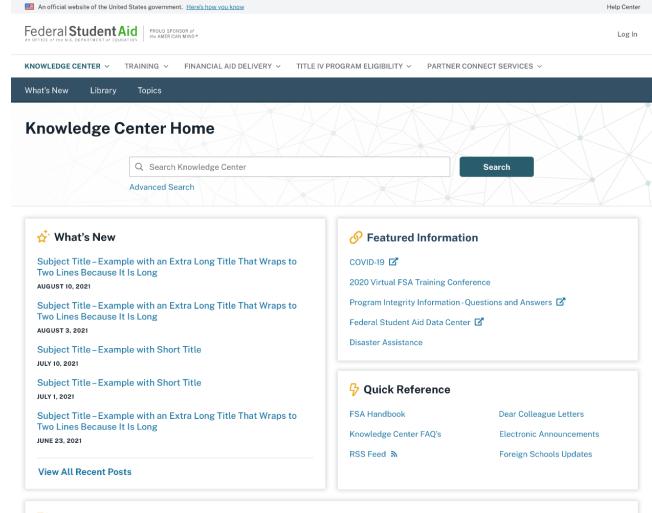
Formerly Information for Financial Aid Professionals Website



## KNOWLEDGE CENTER

Replaces the IFAP website

- Updated design and simplified layout
- Streamlines the organization of resources and information articles
- Improved search capabilities for more relevant search results





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## \* Resource Type

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### Program

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### System

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## **KNOWLEDGE CENTER**

## Key sections include:

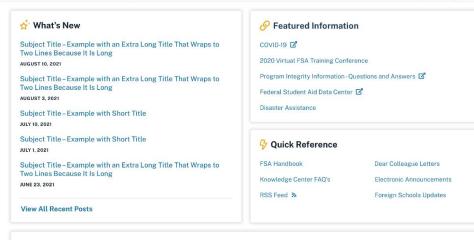
- What's New
- Featured Information
- Quick Reference
- Library
- Topics
- Laws and Regulations
- Knowledge Center Subscriptions

What's New Library Topics

## **Knowledge Center Home**

Q. Search Knowledge Center

Advanced Search





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### \* Resource Type

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### **Functional Area**

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### System

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## View Library



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**View Topics** 

### Laws and Regulations

Code of Federal Regulations - 34 CFR Part 600 to Part 679

Code of Federal Regulations - 34 CFR Part 680 to 699

Federal Registers

US Code (GPO Compilation)

### **Knowledge Center Subscription**

Subscribe to get the latest news and updates from the Knowledge Center.

Subscribe

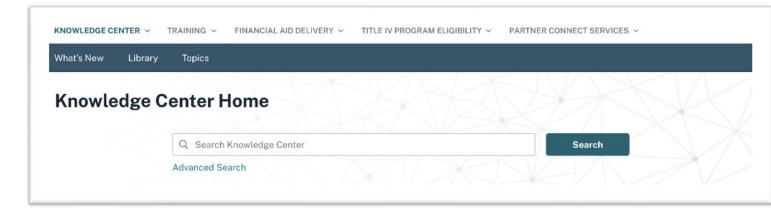
11



## **KNOWLEDGE CENTER – SEARCH**

Search and Advanced Search capabilities have been updated to provide better results.

Search now includes "Type-Ahead" and "Popular Topics" search capabilities as well as search tips.



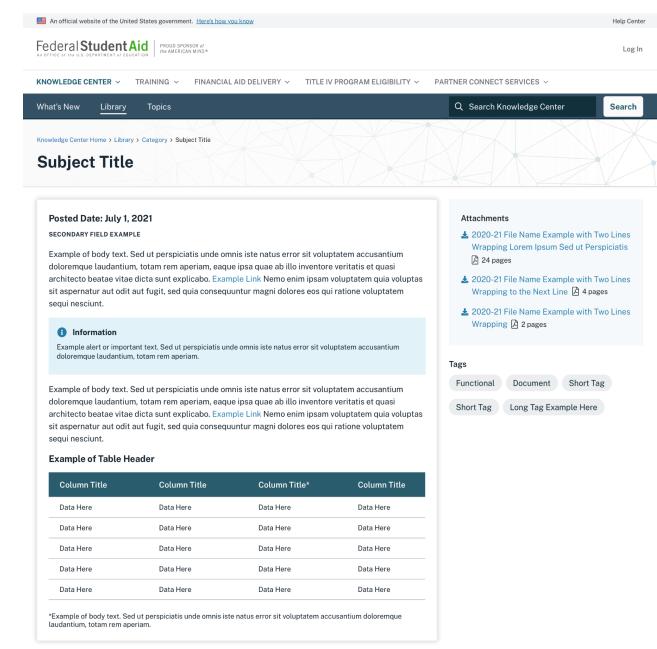
## Knowledge Center Search

Knowledge Center Home > Knowledge Center Search

Q Search Knowledge Center				Search
Advanced Search Options ③	)		5	Reset Options
RESOURCE TYPE			YEAR OPTIONS	
<ul> <li>All Resource Types</li> </ul>	FISAP Form and Instructions	NSLDS User Resource	<ul> <li>Calendar Year</li> </ul>	
Conference Presentation	Foreign School Update	OPodcast	<ul><li>Date Range</li></ul>	
Dear Colleague Letter	FSA Assessments	O Social Media Tools		
Electronic Announcement	FSA Demo Sites	System Technical Reference	PUBLICATION DATE	
Federal Register	Handbook, Manual, or Guide	○ Training	Beginning Date *	
Federal School Code List	Interest Rates	Webinar	MM/DD/YYYY	
FFEL Special Allowance Rates	MSURSD Catalog Reference Documents	Worksheets, Schedules, and Tables	End Date *	
FFEL Variable Interest Rates	Newsletter		MM/DD/YYYY	

## KNOWLEDGE CENTER ARTICLES

- Layout of articles are more user-friendly
- Attachments are easily accessible prominently on the page
- Posted Date is included as well as a "Last Modified" date

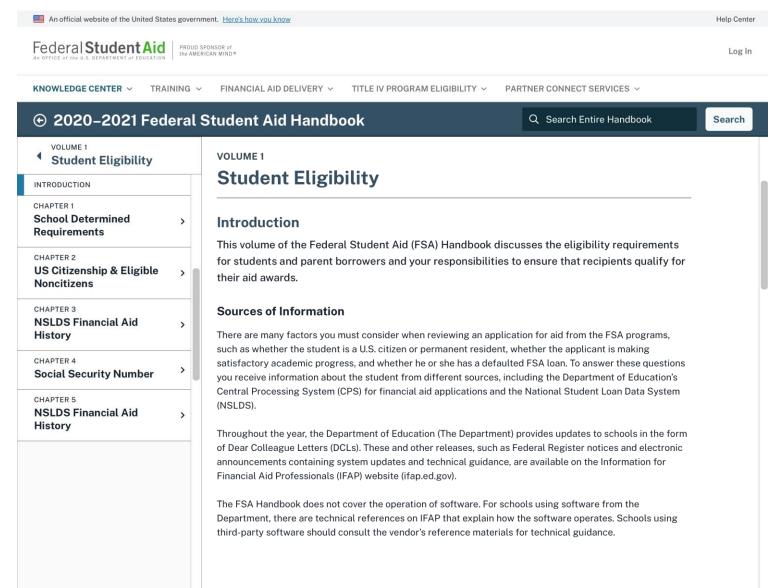


Last Modified: 8/13/2021

13

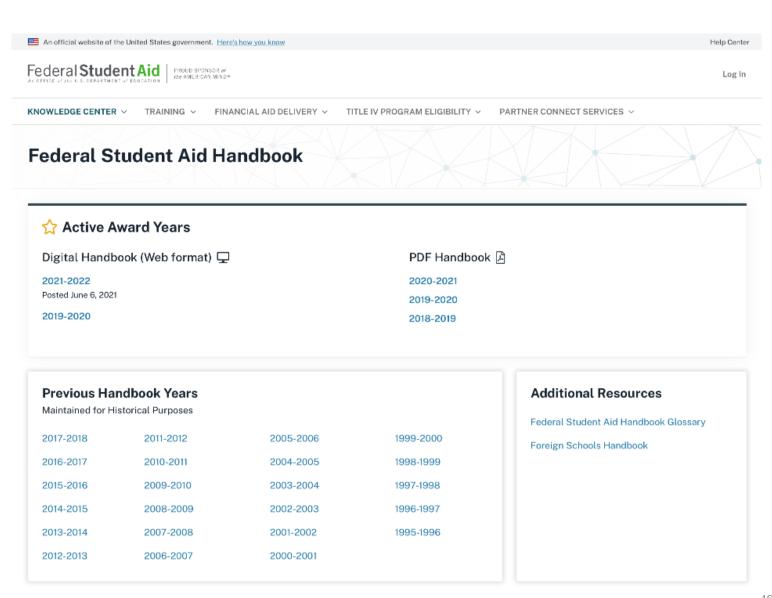


- Available through the Knowledge Center
- Handbook volume and chapters presented in an interactive HTML design
- Enhanced search capabilities
- Handbook content now includes an "Originally Published" date and "Last Modified" date



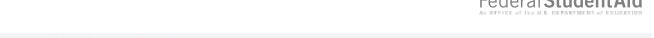


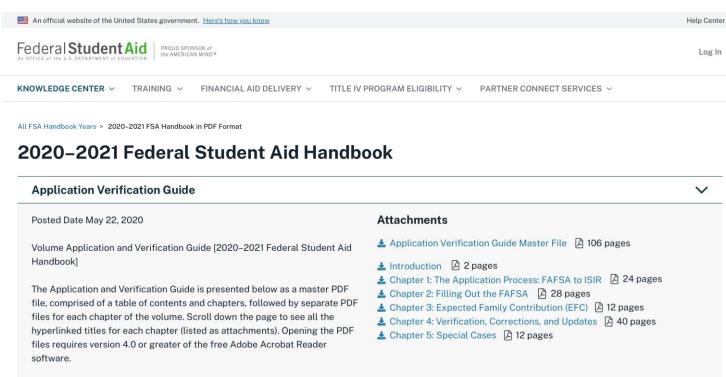
- Prior versions of the Handbook as well as Foreign Schools Handbook are in one central place
- Prior versions of the handbook available in PDF





- The complete Handbook can be downloaded into PDF
- Volumes and chapters can also be downloaded into PDF





### KNOWLEDGE CENTER

Knowledge Center Home FSA Handbook

Knowledge Center FAQ

## TRAINING

Training Resources FSA Training Conference Financial Aid Toolkit

### FINANCIAL AID DELIVERY

System (NSLDS)

Reconciliation & Closeout

Application & Verification Calculating Awards & Packaging Origination & Disbursement Appeals Campus-Based Processing Return of Title IV Funds National Student Loan Data

### TITLE IV PROGRAM ELIGIBILITY

Title IV Participation Application Maintain Eligibility Audit Submission Cybersecurity School Closures

### STUDENT, PARENT. BORROWER ACCOUNTS

Account Search Date Range Search Record ID Search

### PARTNER PROFILE

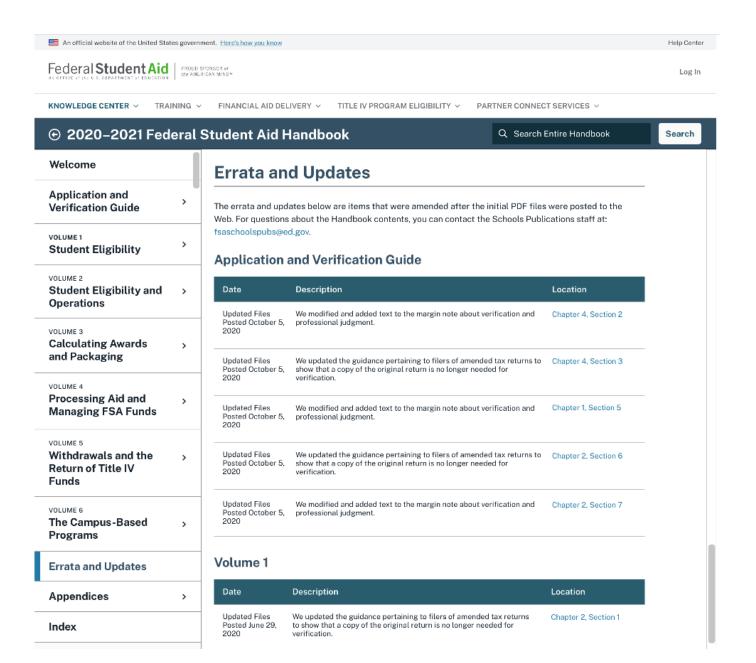
My Partner List Partner Search

## MORE INFO

About This Site Data Center Help Center Feedback Center Important Dates



 Updates and changes to the Handbook are documented in the Errata and Updates section



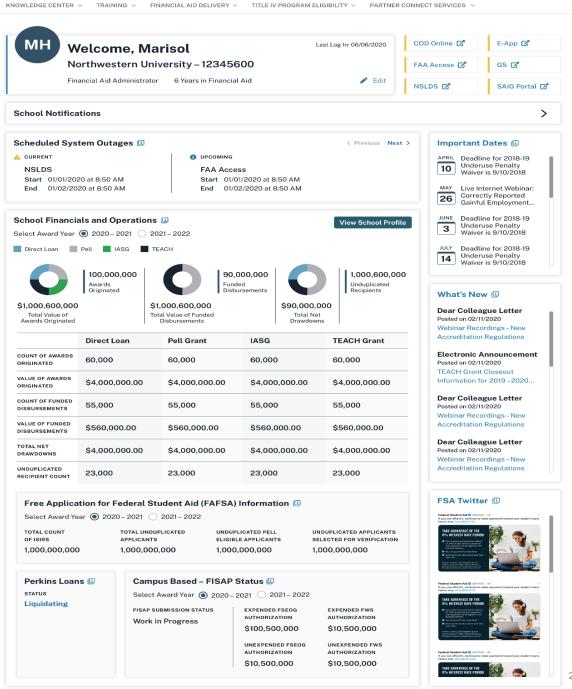
## PARTNER DASHBOARDS

Partner Connect Feature



## PARTNER DASHBOARD

- An intuitive, user friendly dashboard displayed upon login
- Tailored information based on partner type and user role
  - School notifications
  - Scheduled system outages
  - Snapshots of high-level operational data, as well as FAFSA, Perkins, and Campus Based data, if applicable
  - Important Dates, What's New, FSA Twitter
  - Links to frequently used systems

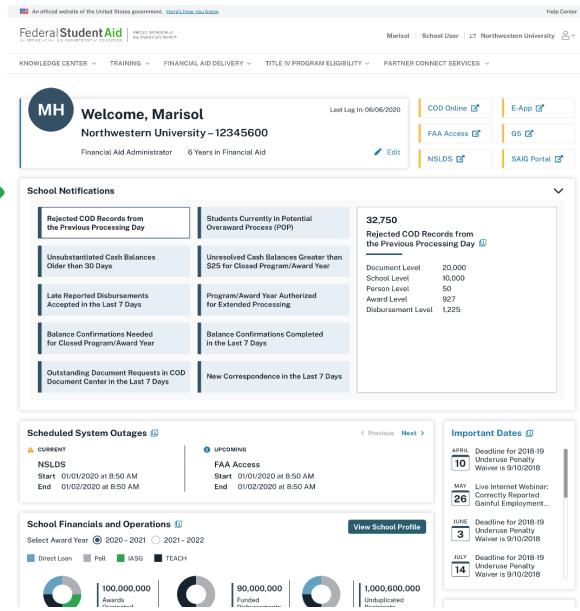


## PARTNER DASHBOARD

## **Dashboard View with Notifications**

 When applicable, notifications will be displayed on the Dashboard with specific details





# PARTNER PROFILES: SCHOOLS

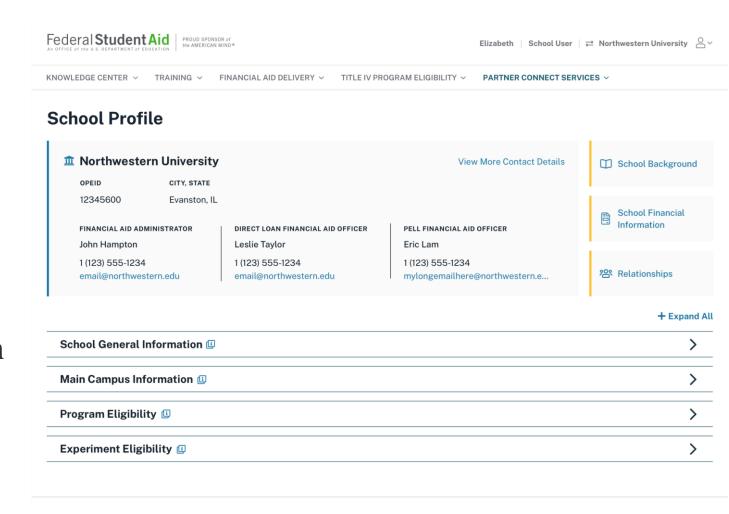
Partner Connect Feature





## PARTNER PROFILE: SCHOOL PROFILE

- User-friendly view of all school information
- Consolidates school profile information that exists in the School File with additional data from COD
- Public school profile information is viewable by all users. Users with an association to a school have access to additional school information
- Users can open each accordion individually or "Expand All"



## SCHOOL PROFILE SEARCH

- Search for a School Profile by -
  - School Identifier (OPEID, Pell ID, DUNS #, etc.)
  - School Name
  - Location (State, City)
- Search results include OPEID, Name, City and State.



Look for the Institution Icon to view the OPEID and other associated identifiers



## **Partner Search**

## **Operating As**

■ Northwestern University		View Profile
12345600	Evanston, IL	view Fronte

## **School Search**

Partner ID Type *	Partner ID *			
Select ID Type	✓ Enter Partner ID			
		OR		
School Name *	State - Optional		City - Optional	
Northwestern University	Select State	~	Enter City	
		OR		
State *	City - Optional			
Select State	✓ Enter City			
				Clear Sea

## **Search Results**

IDs	OPEID 个	School Name	City	State
血	12345614	Northwestern University Branch 1	Evanston	Illinois
血	12345614	Northwestern University-Chicago Campus-Kellogg School of Business Home	Evanston	Illinois
血	12345614	Northwestern University Branch 3	Evanston	Illinois
血	12345614	Northwestern University Branch 4	Evanston	Illinois
血	12345614	Northwestern University Branch 5	Evanston	Illinois
血	12345614	Northwestern University Branch 6	Evanston	Illinois
血	12345614	Northwestern University Branch 7	Evanston	Illinois
血	12345614	Northwestern University Branch 8	Evanston	Illinois
血	12345614	Northwestern University Branch 9	Evanston	Illinois
*	1004E014	Northwestern University Dennah 10	Evanatan	III:nain 24

## SCHOOL PROFILE DETAILS

- School Profile includes School Background, School Financial Information, and Relationships sections.
- The School Profile page also has school general information and main campus information.

## **School Profile**

FINANCIAL CONTROL TYPE

**ELIGIBILITY ACTION CODE** 

15 - Loss of FFEL Plus

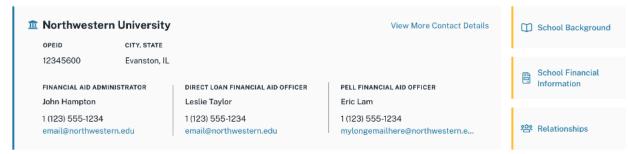
02 - Privately Funded

ETHNIC CODE

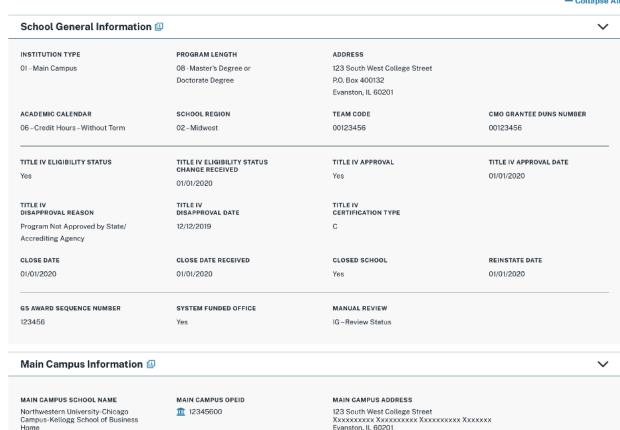
05 - Ethniticy Not Reported

ELIGIBILITY REASON CODE

31-Financial Review



— Collapse All



**ELIGIBILITY ACTION DATE** 

03/14/2020

## SCHOOL PROFILE **DETAILS – CONTINUED**

 The School Profile page also contains program eligibility details and experiment eligibility, if applicable.

Northwestern University-Chicago 12345600 123 South West College Street Campus-Kellogg School of Business Xxxxxxxxx Xxxxxxxx Xxxxxxx Xxxxxx Evanston, IL 60201 FINANCIAL CONTROL TYPE ETHNIC CODE 02 - Privately Funded 05 - Ethniticy Not Reported **ELIGIBILITY ACTION CODE ELIGIBILITY ACTION DATE ELIGIBILITY REASON CODE** 15 - Loss of FFEL Plus 31-Financial Review 03/14/2020 PROGRAM PARTICIPATION AGREEMENT PROGRAM PARTICIPATION PROGRAM PARTICIPATION AGREEMENT AGREEMENT EXECUTION DATE **EXPIRATION DATE** SENT DATE 01/01/2020 01/01/2020 01/01/2020 SCHOOL TYPE TAX IDENTIFICATION NUMBER PREVIOUS TAX IDENTIFICATION NUMBER Private 00123456 00123456 ACCREDITING AGENCY DESIGNATION ACCREDITATION ACTIVE INDICATOR ABSFE Primary Active NON-PERFORMANCE TRACKING NON-PERFORMANCE NON-PERFORMANCE EFFECTIVE DATE TRACKING END DATE TRACKING REASON 12/12/2019 01/01/2020 ELIGIBILITY FOR SINGLE DISBURSEMENT Yes FLIGIBILITY INFORMATION ELIGIBILITY OVERRIDE Program Eligibility 🗓

	Program Eligibility Approval	Program Eligibility Effective Date	Program Eligibility Expiration Date	Foreign School Processing Extension Begin	Foreign School Processing Extension End
Pell	Yes	01/01/2020	12/31/2020	02/17/2020	07/14/2020
TEACH	Yes	01/01/2020	12/31/2020	02/17/2020	12/01/2020
DL Plus	Yes	01/01/2020	12/31/2020	04/13/2020	12/17/2020
DL Sub/Unsub	Yes	01/01/2020	12/31/2020	09/03/2020	12/07/2020
FWS	Yes	01/01/2020	12/31/2020	02/12/2020	12/25/2020
FSEOG	Yes	01/01/2020	12/31/2020	01/30/2020	10/17/2020
Perkins	Yes	01/01/2020	12/31/2020	03/29/2020	06/09/2020

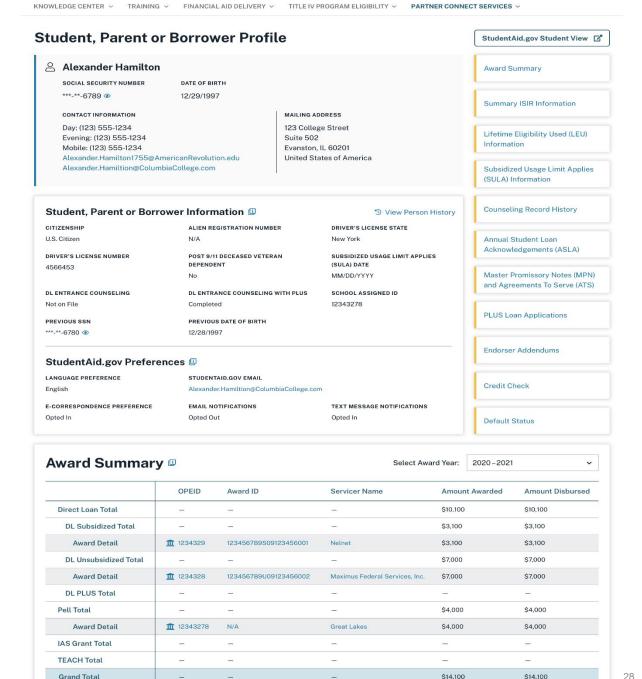
Experiment Eligibility 🗓			~
Experiment Type Code/Description	Begin Date	End Date	
06–Eligibility of Dually Enrolled Students with Intellectual Disabilities	01/01/2020	12/31/2020	
06–Eligibility of Dually Enrolled Students with Intellectual Disabilities	01/01/2020	12/31/2020	

## STUDENT, PARENT AND BORROWER ACCOUNTS

Partner Connect Feature

## STUDENT, PARENT, **BORROWER ACCOUNTS**

- A comprehensive view of FSA customer accounts within FSA Partner Connect
  - Demographic Information
  - StudentAid.gov Preferences
  - **Award Summary**
  - **Summary ISIR Information**
  - Lifetime Eligibility Information
  - **SULA Information**
  - **Counseling Record History**
  - MPN and ATS Information
  - PLUS Loan Applications
  - **Endorser Addendums**
  - Credit Check
  - **Default Status**





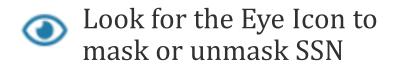
## STUDENT, PARENT, BORROWER ACCOUNTS

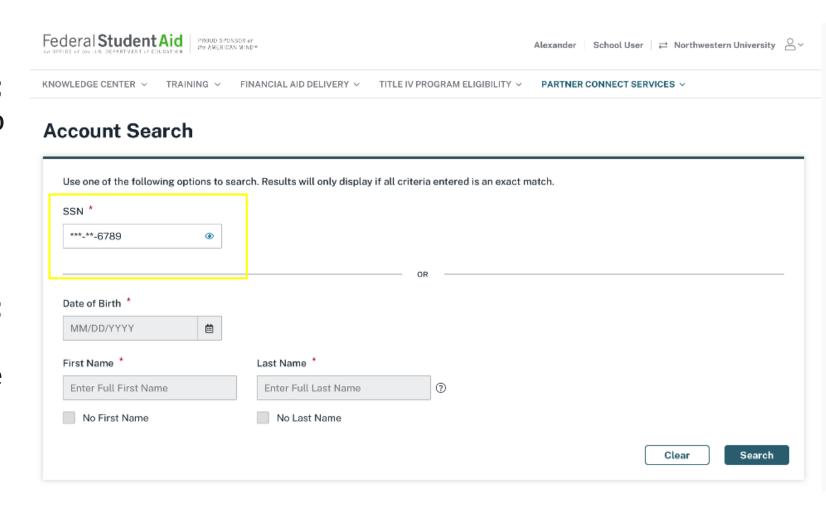
## Search for accounts by:

 Social Security Number; partners are required to enter a 9-digit number for an SSN search

## OR

 Date of Birth and Name; partners must enter at least a first or last name







## STUDENT, PARENT, BORROWER ACCOUNTS

- Search Results include:
  - Social Security Number
  - Full Name
  - Date of Birth
  - Email
  - City
  - State

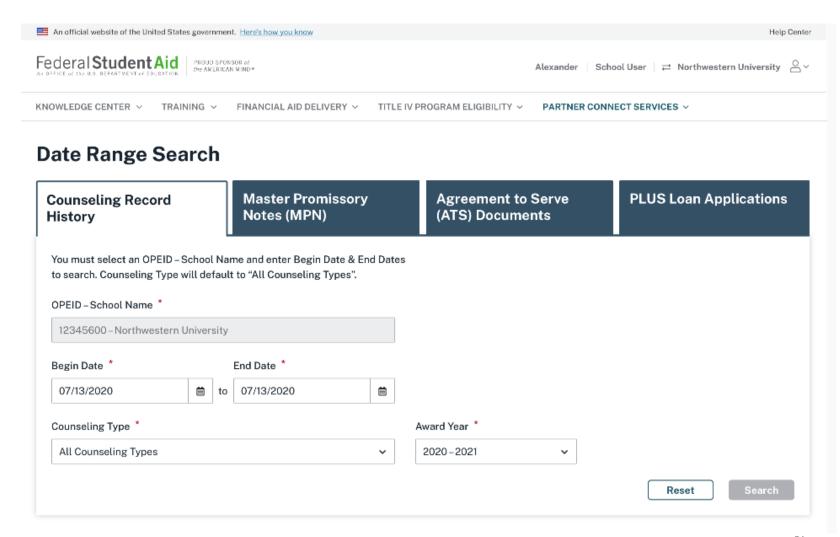
## Search Results

SSN		Full Name	Date of Birth	Email	City	State
***-**-6000	<b>@</b>	Alexander Hamilton	12/29/1997	sample-email@u.university.org	New York City	New York
123-45-6789	80	Alexander Hamilton	12/29/1997	sample-email@u.university.org	New York City	New York
***-**-5555	<b>④</b>	Alexander Hamilton	12/29/1997	sample-email@u.university.org	New York City	New York
***-**-1111	<b>③</b>	Alexander Hamilton	12/29/1997	sample-email@u.university.org	New York City	New York
***-**-2222	•	Alexander Hamilton	12/29/1997	sample-email@u.university.org	New York City	New York
***-**-3333	<b>@</b>	Alexander Hamilton	12/29/1997	sample-email@u.university.org	New York City	New York
***-**-4444	<b>③</b>	Alexander Hamilton	12/29/1997	sample-email@u.university.org	New York City	New York
***-**-6666	<b>④</b>	Alexander Hamilton	12/29/1997	sample-email@u.university.org	New York City	New York
***-**-7777	•	Alexander Hamilton	12/29/1997	sample-email@u.university.org	New York City	New York
***-**-8888	<b>④</b>	Alexander Hamilton	12/29/1997	sample-email@u.university.org	New York City	New York
***-**-9999	<b>③</b>	Alexander Hamilton	12/29/1997	sample-email@u.university.org	New York City	New York
***-**-1000	•	Alexander Hamilton	12/29/1997	sample-email@u.university.org	New York City	New York
***-**-2000	<b>@</b>	Alexander Hamilton	12/29/1997	sample-email@u.university.org	New York City	New York
***-**-3000	<b>④</b>	Alexander Hamilton	12/29/1997	sample-email@u.university.org	New York City	New York
***-**-4000	•	Alexander Hamilton	12/29/1997	sample-email@u.university.org	New York City	New York
***-**-5000	<b>③</b>	Alexander Hamilton	12/29/1997	sample-email@u.university.org	New York City	New York



## STUDENT, PARENT, BORROWER ACCOUNTS

- Date Range Search is available for the following:
  - Counseling Records
  - Master Promissory Notes (MPNs)
  - Agreement to Serve (ATS) Documents
  - PLUS Loan Applications

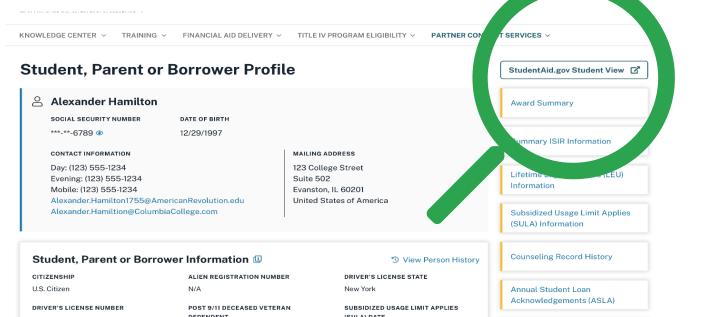


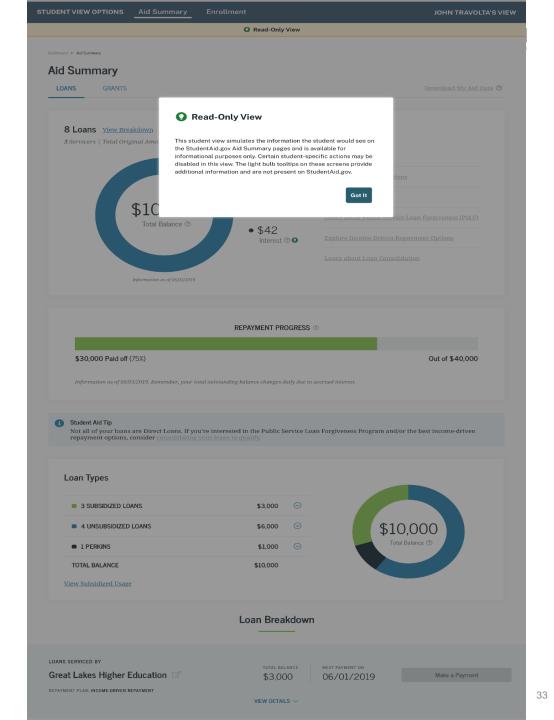


Partner Connect Feature

## STUDENTAID.GOV STUDENT VIEW

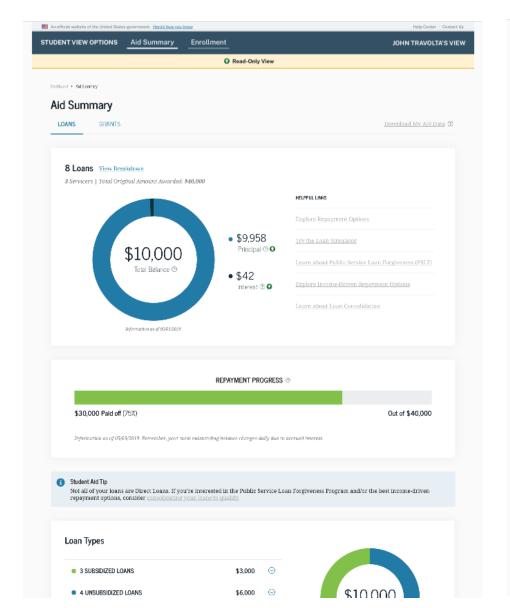
- Allows schools to view what FSA customers are seeing on StudentAid.gov
- From the Student, Parent, Borrower
   Account, navigate to a read-only view of
   StudentAid.gov.

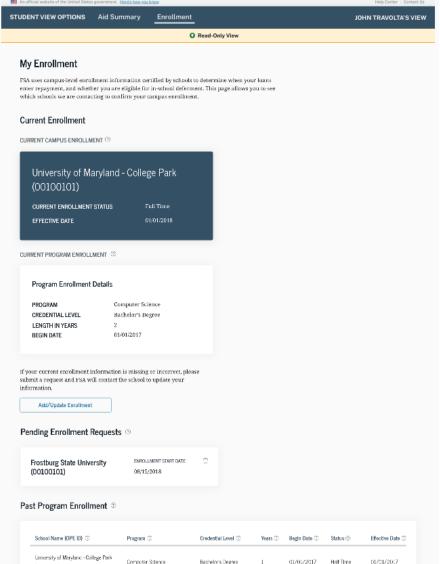






## STUDENTAID.GOV STUDENT VIEW





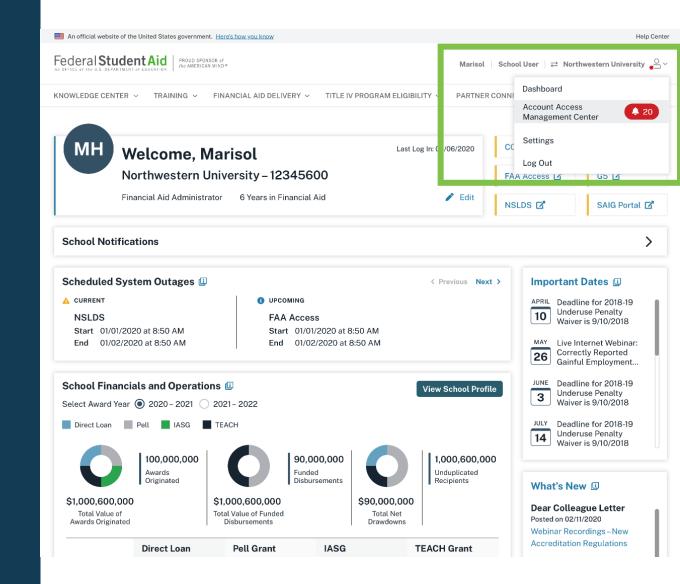
## ACCOUNT ACCESS MANAGEMENT CENTER

Partner Connect Feature



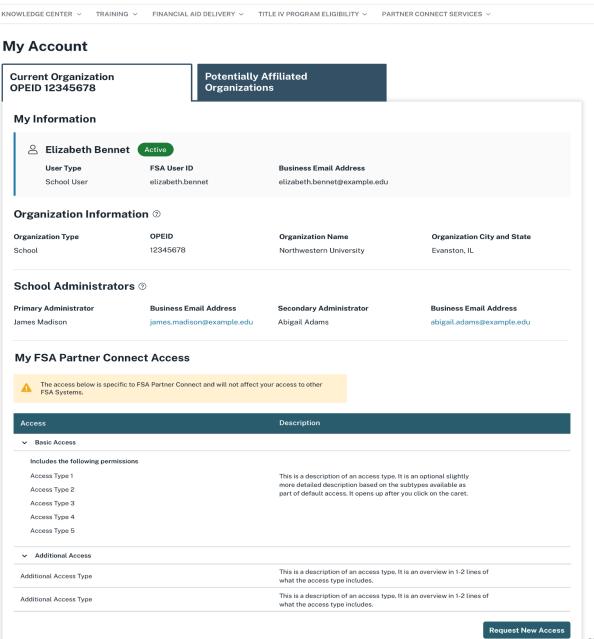
# ACCOUNT ACCESS MANAGEMENT CENTER

All users with a Partner Connect Account can view their account access details and request additional access



# ACCOUNT ACCESS MANAGEMENT CENTER

- Provides user account details
- Users can view access for all affiliated organizations
- Primary and Secondary
   Administrators email addresses are included for easy reference
- Users can also view their specific access and permissions as well as request additional access



Federal Student Aid PROUD SPONSOR of the AMERICAN MIND

## FSA PARTNER CONNECT

**MARCH 2021** 



## WHAT'S COMING NEXT?

## FSA PARTNER CONNECT TRAINING

Training opportunities will be available before and after FSA Partner Connect launch

With the launch of FSA Partner Connect we're rolling out more comprehensive training and communications!

Partners will be informed and equipped with the tools for success through a series of **live** webinars, recorded videos, and job aids and tutorials.

Stayed tuned for training communications!



## PARTNER EXPERIENCE COUNCIL

Ensuring Next Gen is designed with our partners in mind

FSA has been engaging the **Partner Experience Council**, a group of partners
who have volunteered to share knowledge
and experience through surveys, interviews,
usability sessions, and focus groups.

The Council members have provided valuable feedback about new features of the partner portal.





# JOIN THE PARTNER EXPERIENCE COUNCIL

Submit your interest in joining the Council by scanning the QR code or navigating to the link below!



## Link: <a href="https://bit.ly/2FMTmMs">https://bit.ly/2FMTmMs</a>

## **Instructions for QR Code:**

- 1. Open the Camera on your smartphone device
- 2. Hold your device so that the **QR code** appears in the viewfinder in the Camera app. Your device will recognize the **QR code** and show a notification
- 3. Tap the notification to open the survey link associated with the **QR code**

## **Q&A**



# SHARE YOUR THOUGHTS

Please take a minute to share your initial thoughts on FSA Partner Connect by scanning the QR code!



## **Instructions for QR Code:**

- 1. Open the Camera on your smartphone device
- 2. Hold your device so that the **QR code** appears in the viewfinder in the Camera app. Your device will recognize the **QR code** and show a notification
- 3. Tap the notification to open the survey link associated with the **QR code**

Menti Code: 20 30 27 1





## PRESENTER CONTACT INFORMATION

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